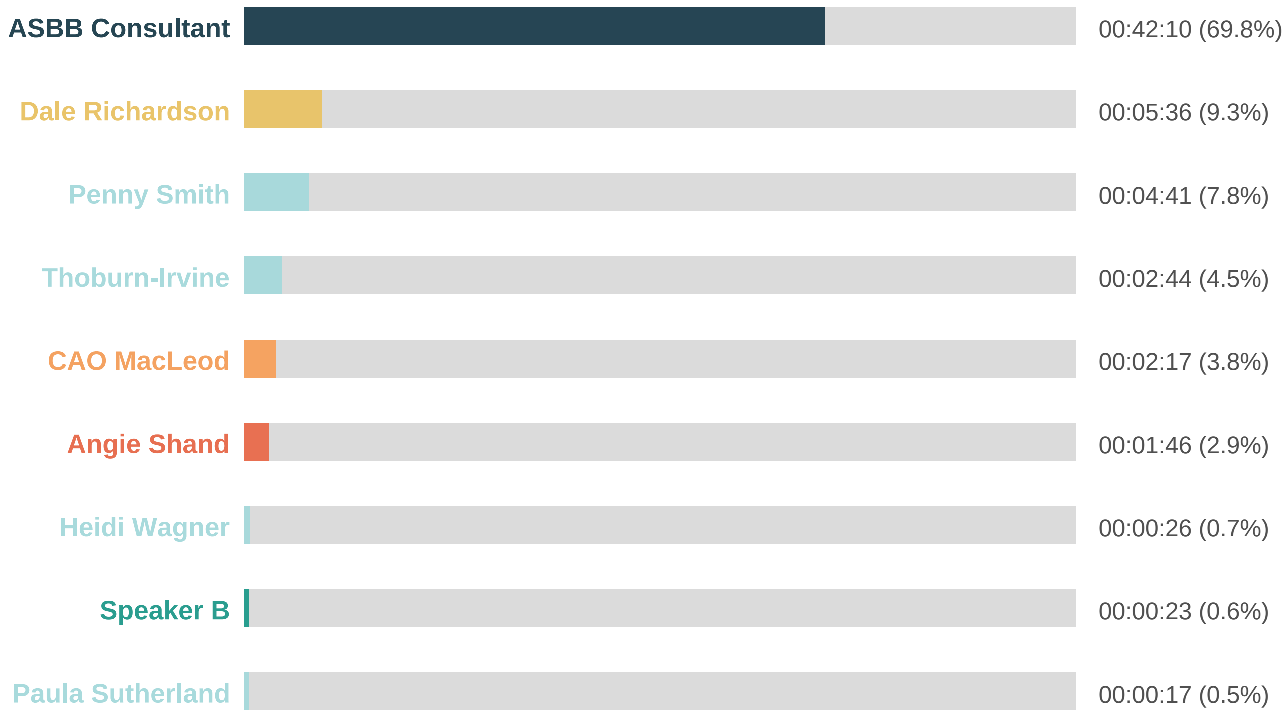
Transcript - July 22, 2026 Gaps Analysis Report from ASBB

Speaker Summary



[00:00:00] ASBB Consultant
What I had planned going over today is just kind of talking about how we did this study, a little bit about the what we heard report, but I won't go into it today because we're short on time, but we'll touch base on it. And if you have any questions, we can definitely answer it then. We definitely want to spend some time with the gaps and then some of the market opportunities that we see, they're very long-term in nature. So keeping that in mind, that's going to be part of our most of our analysis. And I think we've done some useful jurisdictional scans, like what have other municipalities done in the same population range and financial resources? So we'll talk about just about two of them here in Nova Scotia, but we have some from Alberta and Ontario as well. And then we'll talk about the three kind of clusters target industries. I'll explain later why we call them clusters and why that's important to keep in mind while you think about this land. And then, of course, we're just kind of in the implementation and road mapping stage. We're finishing up some of our calls that we have with stakeholders. So I'm hoping that the report is kind of finished by the end of August, like that's our timeline here. So at some point, we're happy to come back with the final results as well. So I won't spend too much time on background, which is everyone knows here that this is the 103 property that we're talking about. But just to revisit the objectives, the study was meant to kind of identify some of the market gaps and opportunities. So that's what we've done with the stakeholder engagement, like really get out into community. I believe you folks had your own survey, an internal survey, and then we also did an extensive one on ones with key business stakeholders. And we held a session with businesses as well. So we heard all around what we thought the community felt were market gaps. But then we also did some analysis on the retail side to see if a Canadian tire or a Walmart or whoever else wants to come in, like what would they look at? So that's kind of like what encompasses the market gap. Then we looked at some potential development opportunities, which is the clusters that we'll talk about. We're in the process of kind of assessing investment readiness as we're of finalizing the top two. And then of course, you know, understanding economic and community benefits and all of that.

[00:02:30] Speaker B
So there's kind of two methodology slides.

[00:02:33] ASBB Consultant
So we kind of wanted to just show you the in-depth community consultations we did. So we had two surveys. We had one, 34 responses. And then we had like an internal survey, which I believe had 11 responses. We had one in-person business consultation that had about eight folks, I think eight folks present. We had two community engagements and that's about 20 to 25 total person that came in person and you know, did a set of workshops with us. One of the locations were here and then we did 8 to 10 one-on-one stakeholder sessions. province of Nova Scotia was one, invest Nova Scotia was one, we talked with Windsor, you know, about the exit five A, we talked with municipality of Moncton, we talked with Halifax Regional Municipality to representatives there, the business part side as well as like a planning side. And then like yesterday, we talked, yeah, we talked with Windsor and then we just have like a few more. We want to talk with somebody from Goosecap and, you know, just kind of like those key stakeholders who've been part of those kind of analysis. So that's the eight to 10. And of course, you know, Warden Smith was one of them and her comments really helped us guide some of the questions that we asked for the stakeholder consultation. So that really happy that happened early on. So this one, you know, I'll only spend a second. So, you know, This is the typical way we go about doing these things, looking at what you have as documents. Val sent us a big folder for that. That was the first month. Then, you know, community consultations we were here were in the jurisdictional scan phase now, market analysis, and then finally, you know, we'll come up a report. So if we go on to slide nine, yeah. This is kind of like the five key themes that came from the business and community consult. So, you know, What you'll see later on is that forming a community vision for that land is incredibly important. So no matter whom we talk to, everyone said that proper developers or developers, investors, they want to understand what is the community's vision. Because when they are developing, they want to make sure that it's in cohesion to that. Because if it's not, they're going to have protests, you're going to have bylaws that don't pass. It's just not going to be feasible. So we wanted to understand, through our consultations, What are some of the things that residents or businesses are proud of, and what are they facing? So everyone, whether it's business or community members, said that the quality of life and the sense of peace and place was important to them. So natural beauty came up in every conversation, the waterfront, the heritage, community trust, small town living, those were really strong assets and foundational for attracting and retaining new residents. Now, one of the gaps for like, you know, from one was that there was significant gaps in everyday services. So folks had to leave for basic things like food, health care, grocery, like bigger grocery options other than just sobies, retail, shopping, banking, financial services. So while folks, you know, love living here, having to leave the community, I believe I'll show you some slides later, like I think 80 to 85% said that they leave for these core services. That was one of the gaps we identified. Work for shortages, especially for youth, was another kind of gap that was identified both businesses and community. Community, I think, really wanted to see their youth retain. They did not want to see their youth leave for jobs. And in fact, a lot of the folks that came back who contributed to team number one there were folks that had left for work in their lifetime. And now they're just returning back home. So they didn't want to maybe see that for the future generation. So workforce, workforce shortages was a big thing that came up. And I think what we learned was that any interest in developing, you know, 103, the 103 property, a lot of folks were like, okay, how can we develop that property in a way where we can create jobs for the community? You know, like that was in their mind. Improved investment readiness, I think businesses identified that as Shell burn grows in the future, they needed clear investment opportunities and workforce availability, strong destination branding, like that's working really well, so tourism was a big, big thing, so investing more in that. And then, so just supporting, having a supports for entrepreneurs and new businesses to thrive, those work, you know, that's the top four. And then, yeah, so I think it just kind of like some identity Some identified some growth sectors that were marine industry, of course, tourism. Remote work was taking off a few businesses were taking off or it was remote or folks had settled in here where they're still working remotely. Housing, residential development, et cetera, like recreation, all of that that I think you folks know, but just showed up in our consultations.

[00:07:46] Penny Smith
So, Mandy, do you want us to ask questions as you're going along through these slides as opposed to waiting to the end?

[00:07:52] ASBB Consultant
Um, yeah, I think that that would be that would be good. I do want to make sure though we I don't take till 9 p.m. or whatever. You guys have to get home, but yeah, that's perfectly fine. Yeah. Thank you. I won't, you know, go over this slide, but the the geese of the summary of this slide is to just essentially just iterate the fact that, you know, there was limited local local and retail services that we heard that over and over again. and they would have liked way more employment opportunities, especially for folks' youth. I think the next slide here. Now the survey, we just pulled out some key results for you because it's going over the survey would have been a whole council meeting by itself, but the first thing was that 28% of residents that are applied to the survey talked about retail and amenities missing. And then nearly 56% travel outside of the municipality to shop for these goods. About 17% wanted to see more local employment. They said that explicitly. And then they felt that a big portion around 30% felt like limited jobs was a barrier to economic growth. I'm 22% identified housing costs as a big barrier to economic growth. So affordability is essentially what they're getting at. And then a big portion, so 85% said that they regularly travel outside of the municipality for recreation or shopping health related needs. So those, I think that, you know, those are things that council members are aware of. It's just kind of nice to see them in survey. That is a large number, 85% you're stating for recreation.

[00:09:45] Thoburn-Irvine
Can you break that down at all?

[00:09:47] ASBB Consultant
Yeah, so here we group recreation, like, you know, shopping, retail shopping, health, all of that. It falls under recreation.

[00:09:55] Thoburn-Irvine
What do they call that?

[00:09:56] ASBB Consultant
Retail therapy? Yeah. Well, we want to say that's the case. But, you know, because the income stone show that people have that income for retail therapy. Right. Just, just that much. But I think, you know, you, we can definitely do a better job awarding that better. But I think you can think about it as, you know, regularly traveling outside to access essential services in a way. Going to the grocery store, whether it's Walmart or whatever, that's essential services in a way.

[00:10:26] Penny Smith
I think we're all aware of one recreational service that we see residents go to White Point 4, and that's the pool. Many, many families go to White Point to enjoy a pool, or whether it's an afternoon, or perhaps a weekend,

[00:10:48] ASBB Consultant
And I mean, you know, for recreation, one of the biggest things that we heard about was just families traveling for sports. You know, just they travel on the road continuously and very limited accommodations to be able to, you know, like stay here, essentially. The businesses, you know, we just put this here because we wanted to give some spotlight to the businesses themselves because they have sometimes more different kind of issues that they bring up. But they brought out the same thing, that the strengths were the same as the community, strengths, you know, natural, natural scenery, quality of life, those are the things that attracted those business owners here, waterfront assets, you know, heritage, a lot of the small business owners showed up to our consultation. So these are the things that they saw as reasons for strong business demand, for their business demands, at least. I think you through attention and workforce development was a big one for businesses, and especially we had a fellow come in, he had a construction business, made about nine to 10 employees, and he was especially talking about how hard it was for him to retain workers and how he would only be able to focus on residential construction rather than commercial because of that constraint. We also had a lady who runs an Airbnb business come here for our consultations and she said the same thing that she wants to expand outside of Shelburne area like for her business, she has demand, but she doesn't necessarily have the capacity to do that with the labor force. So hiring I think is restricting business world in a way. So being able to attract and retain a lot of that, the youth force that moves out is essential for the future, you know, the future of the business that exists here. Opportunities are for sure, tourism, healthcare, senior services, like, you know, whether it's health center or senior homes, but we see that in our population trends too. Like the 3.7% population world that we see, like most of it is for, you know, seniors. That's going to come up, we feel as a future opportunity. And being prepared for that is smart to do, because we had a call with HRM this morning, actually, regarding this project. And what they said to us is that for the first time that they're seeing house prices increased, which they didn't see in bridge water. And we saw that in our data in Queens. So what's happening is that bridge water you know, Chester, all of those are bedroom communities or for Halifax. So like even in West Hands where we interviewed as well, they were like residentialists taking off. And these are becoming bedroom communities. So what's happening is that we have smaller urban centers within the province. Bridgewater is one of them. And Queens Liverpool, all of those are bedroom communities for that urban center, right? So Shellburn is at some point beginning to be a urban, sorry, a bedroom community. for those bigger urban centers like Bridgewater and so on. So I think this is really timely to think about who are going to move in here as a bedroom community because the market out pricing is already happening in Queens and elsewhere. So house prices here are still affordable. So this is going to be the next kind of population demand we think. But it's all coming up. I'm getting excited and I'm just saying it all here. All right, so we wanted to kind of walk you through the retail part. I think maybe if we look at the next slide here, slide 14. So a big part of this project was understanding, okay, like why is there not like a group to grocery store or like a retail experience here, right? So like if you think, well, yeah, in this case, you have the Walmart, you have the, you know, super storage, like all of those big chains in one area. Right, so why is that not taking place here? So part of the analysis was that we looked at, okay, what do retailers like that look at when they're entering a market? One is the trade size area. So what they look at is trade area size. So they count all of the residents who are likely to shop at that location. And those residents don't only come from people that live there, like they have a large trade area. So it makes up a primary which is people that live there. Secondary, which are people that are traveling there. So in the armate's case, you can think about town of Yarmate, municipality of Yarmate as primary. Secondary would be actually shall learn, you know, barrington, Claire, like all of these areas. And then tigitary is kind of like tourism, like folks that come during summer or months, they have residents homes or they're visiting. Those are tigitary. So we add up primary, secondary, tigitary to come up with the trade area. Okay. And that's something that they look at when they look at whether or not they're going to build something like that, or if there's going to be a market demand for it.

[00:16:04] Thoburn-Irvine
So I think some people, because I've heard it, I've seen it online just as you say, you know, we've got them in awfully currently. And people wish that we could have a fresh cuts, that we could have a red and white, a red and white coming from the arm, and people will travel to fresh cuts in bridge water. for what they perceive to be better value. Clearly, you have to travel a lot of time to do that.

[00:16:32] ASBB Consultant
I actually have a slide. That's the thing about being economists. We have a slide for everything. But we do have a slide for that just to go over that, just to show you the population densities that they usually look at. But what we think the blue future is bright is going to happen at some point.

[00:16:50] Thoburn-Irvine
You know, I could if I could also say people um, desire, you know, a meat cutting place. You know, we are a group of independence here. There is a big hunting culture. And so to have, I don't know what they call that an abattoir today. Or is that, is that birds? I'm not sure. But anyway, butchering so people have sources of healthy meat. Yeah. Yeah. Yeah. Okay. Thank you.

[00:17:12] ASBB Consultant
And all of that, you know, uh, is there on clustering? When you have enough population density, one shop opens up, and then another shop opens up, it's just about density of the population. There has to be enough demand.

[00:17:29] Penny Smith
And we did have that years ago. I mean, I'm sure everyone here would remember Grovistins. And we had the population back then. So hopefully we will get to that point again. Some of them are coming back.

[00:17:44] ASBB Consultant
They're elder now, but they're coming back. So we look at customer concentration and access. That's the density point. I won't go back. I won't go into too much detail about that now. They often look at growth outlook. So growth outlook, meaning population increase, household increase, and then the incoming increase. So what is going to be the income potential of those folks, because the spending power is going to be important. And then of course, spending, how much do they spend on household transportation, et cetera, We have the top five categories in this deck for you to look at where shall burn Yarmeth and Queen spend on.

[00:18:19] Penny Smith
So, yeah, I was surprised that ours was as high as this.

[00:18:24] ASBB Consultant
Yeah, this is a very high number. Yeah. And you have to also remember that Yarmeth is capturing a lot of your spending, right? Like a lot of folks are going to Yarmeth to their groceries and things like that. So, that's actually an underestimate because it's not capturing the whole total retail experience That would have been here essentially, you know way. Okay, so the next slide is I think counselor, you know, you were just getting at, right? So this slide gives you an approximate of what type of retail stores require, what type of trade area and driving distances. So when you look at kind of convenience stores like Irving, Circle K and all of that, usually the typical trade area population is around 1,500 to 5,000. So that's really small. for a gas station. 5 to 10 minutes of driving time is kind of like what they look at. And it's usually about 10 to 50 people per kilometer square, like that's the density of it. Approxima distance is between 3 and 8 kilometers, and then we just kind of added some sources like we looked at. The MIT Center for Realistic actually has a lot of great resources, which we found out through this study, which is good. Now, the red and whites that we were alluding to before, those are called small grocery or independence, and they usually have a trade area population of like 5,000 to 10,000. So you see them in the municipality IR met like in the municipal bounce, right? And you see it in the town. This is kind of like who they service within that population bound. Again, 10 to 15 minutes within a driving distance. So these food land, like what you see in Shelburn is around 8,000, 20,000. That's their kind of target population. Then you get to the Canadian tire home depots, Walmart Superstore centers, and those are between 25,000 to 120,000. Like, those are the population that they're getting at. So anytime you're hitting 30,000 population, that's when you're going to start seeing that type of shopping experience. strip mall sort of thing that you see in Yarmuth and we'll show you the trade area populations in I believe the next slide. So and then you know like you can obviously see like Costco 150,000 and above which is why you see that in HRM but not necessarily here. Having said that Yarmuth does have a running man so you know it is growing and then of course IKEA and so on like you need really to be in an urban area. But in general you can look at like The bulletins basically outline for you what kind of population retailers look at to be able to come in and justify building.

[00:21:11] Speaker B
So, you know, I lived out in BC for a while.

[00:21:14] Thoburn-Irvine
It was always wonderful to go to break, break, break outside of Calgary. And I'm sure that was probably, and maybe there's something in Dartmouth like that as well, niche shopping that brings people in. not just, you know, not just people that are living in the area, but actually ends up being a destination point because they're unique and they're boutique. And I don't know if anything like that could ever transpire here, but it's a draw.

[00:21:41] ASBB Consultant
Yeah, for sure. So I think that's where we're at. I mean, the area. If you had like she called with the HRM this morning and they were saying the indictment crossing a property developer, developed, you know, like that mixed use type of thing and they had retail spaces exactly what you're saying. Like there were all boutique shops. There wasn't a single chain. There were all boutique shops. And that is drawing that folks to the graduate crossing area. And I think that's exactly what he was alluding to. I think Dartmouth Crossing is a great example of when population increases, the density increases, how these kinds of local shops can just take off. And it's not often like these Canadian tires or whatever popping up. It's local, you know, somebody sending that hand made good, somebody having a candle store.

[00:22:29] Penny Smith
Like it's all local businesses that are, I think there becomes a public demand for that as well. Yeah. Yeah. The make-up of the population. Like who demands what?

[00:22:39] Speaker B
No.

[00:22:39] Dale Richardson
Yeah. Yeah.

[00:22:40] Speaker B
So it's for Richardson?

[00:22:43] Dale Richardson
Just to lend some to that point. I think back years ago in the businesses we did have, whether it be Lockport and Shelton, they were unique. I think of the Dress Shop. It was run out of a house in Lockport. They drove all over the end of the province. It got there. It was because of the quality and what was available. And they knew if you were looking for something that was I will say an in between, but good quality dress that's where they went. They went to my address shop. Our local stores, they didn't just have meat and whatever they had a variety of all the above. So they were all an individual shop. The problem I think became over the years as population dropped is they couldn't compete against box stores. The big box stores and we all say, oh, how much money we save driving to Halifax, to Costco. But we're paying a fee up front. We pay a fee when we go to the gas station. And we usually have to eat to get there. And when we come home, you didn't save a damn thing. You have a broader range, maybe a product, but again, it's limited. So the mindset that we're saving money by driving and consuming a lot of things I think we have that niche market available. We just have to wrap our minds around that if it does cost a dollar or two more, you're still not paying an absorbent price. We don't need the big Costco or the Walmart's because they're not going to do a lot for an economy here. The industrial, you know, make work project is Yes, that will bring in bodies and what we need in the retail size. So in ancient markets, that we don't have to drive 100 miles or 50 miles to get fixed.

[00:24:54] Penny Smith
I think we're seeing it more and more just how incredibly important it is to shop local and to support our local businesses who support us every single day, whether it's through events or providing funds for someone who has a medical emergency or what have you. Those people are always there for us, those business owners, so.

[00:25:18] Dale Richardson
And I look at just a small business in Lockport area, the Lockstock and Merrill, and they started. Good gravy. You can find just about anything. Now when I want something, yeah, lots of times I can go there. And that's what we used to find in our local small shops is they catered to what the community wanted. So anyway.

[00:25:42] ASBB Consultant
And I think the Yarmeth is actually a really good example of that in food sector, like just the sheer amount of cafes that have opened up, like bubble tea, two or three different coffee shops, all within the last three years, right? And they're busy, you know, they're doing well. So I think that that's just a result of population increase, again, and a younger population increase. You see like the working group like from a 19 to 64 like that, especially 34 to 45 range. They're working families that that age group has gone up in the armate, for example. And those are the folks that, you know, like you said, like support local and we feel good to go to these local copies shops than then importance. I still like my drive-through in the morning, but you don't feel bad.

[00:26:30] Penny Smith
Okay, I'm just going to look at the time here. I know, or we can keep you here. I don't know if you brought your PJs or not, but you may be staying for a while. I know we're only halfway through. That's okay. We've got lots of questions, and we really appreciate your responses.

[00:26:43] ASBB Consultant
Yeah, absolutely. Let's move along. I think slide 16 is important. We'll maybe spend a minute here. So I think the reason why we found through our analysis is some of the reasons why the retailers are probably not going to come by. I think I want to say just like tomorrow or currently is because I think we're just seeing a relatively small trade area size for those big retailers, like the point being for those big retailers. Few are current customer concentration, opportunities to grow, the long-learn population is growing, but perhaps maybe not 19%, or 8.5% or 7% that they see in the bedroom communities closer to Halifax, let's say. So those developments are just happening around it in your own Halifax currently, and it's going to take some time to get down here. But nevertheless, I think there are definitely some opportunities that we want to present today. We won't spend too much time on the 17, but I want to show you the slide just for a second, the next slide. So if you calculate the trade area, like I explained in the beginning, primary, secondary, catch, sherry, You have Shalburn currently is around 13,000. Yarmeth are on being 55,000. And then Queens being 30,000 plus. So Queens captures a lot of Western Bloomberg, right? A lot of because Bloomberg County is just huge. So anything west of the town is basically captured around Queens. So that's the reason why you see these kind of big retail experiences there. but not necessarily here. But nevertheless, it's not to say that local and niche experience cannot happen here. Market gap, too, was just a customer concentration. I won't spend too much time on it, but in general, if you look at per square kilometer squared inhabited, there's about 12.5 residents per shelter, 29.4 for Yarmouth, around 6.9 for Queens. The reason for that is, you know, just the wide range that we just explained, right? So again, like concentration, if you look at that, that's probably the reason. I wanna spend a little bit more time on a market gap four, which is slide 20. Yep, so this is actually how much is being spent in consumer spending. So 374 million children, that's quite a lot. Yamers County doubled that. but we have to remember population is more than double that there. Queens is 243 million. The biggest bracket, I think, is the next slide there. So, yeah. So, housing is the biggest one. So, again, Yarmouth County is the blue. The dark blue is Shelburne County and the red is Queens County. So, housing, no doubt, is the largest kind of cost bracket for folks. Transportation then is the second one. So, cars, repairs, gas, all that goes there. Food is a third household operations is the fourth one. So there you have spending on, you know, if you're going to repair a deck, all the materials, all of that, like that would fall into household. And then recreation is the fifth one.

[00:30:07] Speaker B
So this is kind of like where our beach eggs go to mostly. Okay. So then I think, I think what I'll do is that I'll come to

[00:30:22] ASBB Consultant
the jurisdictional scan, so which is slide number 24. Okay, so here, you know, I want to show you what some folks have done, like some other communities have done, and then kind of like go to the three target areas. So when we looked at like what other folks have done, when they have done investment attractions, we looked at cooscap landing, Nova Scotia, on North Caledonia in Ontario, you know, two or three examples in Ontario, and then Foothills County and Alberta and then Lackcomb County. When we did our selection, we looked at like, okay, the municipality owns the lands. The site characteristics are pretty much close to the highway, financial feasibility and financial comparabilities there. You know, you can compare the scale of development, and then, you know, we focused in Canada because it's different elsewhere. So when we looked at GooseCap, for example, that's the next slide here. They had about, okay, so they had a similar land there. And what they did was that they had serviced around 62,000, like 63,000 residents drawn from, you know, handsport, welfare, can't fill. all of that area, and they built like a commercial vehicle service area, a restaurant, retail space, community center. So that was their tourism kind of center that they built, right? So same thing like they had a municipal land, and then this is what they were able to attract there. I don't think population was the reason why these facilities came about, like that wasn't the reason, yet the demand was there. But they did what we found was that they had strong partnerships with the province, especially in tourism. So a lot of the funding came about from there. So feasibility was a big thing. So it had multiple funding scenarios, multiple phases. The development costs were done in a way where it was cost-shared in a way that was beneficial, and they had a good business plan. So that was one example of a good development. So again, we learned that strategic location isn't enough. It is important to have like a very clear development plan. Market demand should always be there because that's how you're going to be self-funding this operation. When we looked at what does infrastructure readiness looks like, oftentimes it was sewer water, all those basic ones done for them. So this was really interesting for us because when we talk to municipalities, almost always they were like, no, the property developers need the sewer and water done. Then they want to hook it up to whatever they have going on. But in HRM, we talked with some folks who actually said that they didn't. They just sold the land as is. And then the proper developers had, you know, water and sewer hooked up. So what we learned from that was the demand. If there's a, like, you know, they don't even have to go and attract investors at HRM right now with their demand going on. So they're able to sell the land as is. Whereas smaller municipalities, there's still needs to be some investor attraction. And a lot of that we're finding from our interviews are local, like going at local developers first, you know, so local meaning that in and around the area folks that are already developing. So that's when I think some of those local developers really want it to be ready, like the site to be ready with, you know, water sewer and whatnot. And all of them recommended a phase plan and who's kept here had a phase plan approach as well. I think Halifax municipality this morning, they have 5,000 acres around in one of the lakes there. And they only developed 400 to 500 acres, like every few years, to this water sewer. So that's a really long-term phase development plant. Nobody does it all together. Windsor, I think, while we were working with Val and Warren, they'd been great to guide us. They both had interest in Windsor. as a commercial area as well. There, what we learned was that, okay, how do they do that? So this was done when Windsor and West Hance was different, like the four-algamation, basically. So this is kind of like West Hance's baby sort of thing. So for them, you know, when they review proposals, community consultation, like, what they said to us was the community vision was really important for them. Like, what do the community want? There's a community consultation, for example, it's really important for them while they update their bylaws. For them, because of being a small municipality, servicing capacity was like a must, so sewer water, all of that had to be in place for development to happen for them. you know, they couldn't attract property developers without that piece. So having like the committee's vision early on, they reiterated was, you know, was important so that it doesn't have to be a negotiated project by project basis, you know, so that they could attract a bunch of developers more easily. They also talked about like the flexibility in planning, so like the flexibility in changing bylaws or planning procedure to attract developers because permitting and all of that takes a long time, you know, and And we'll show you later like financial incentives. Our tools are like a big way to protect developers.

[00:35:54] Speaker B
Like what kind of tools can you offer?

[00:36:01] ASBB Consultant

I mean, the biggest kind of lessons learned I guess for when we looked at other jurisdictions was 27. Yeah, so the ability to provide key data to business inquiries. having an inventory available land and buildings, including the current zoning and any limitations, like those were really important things, knowing the strength and weaknesses much of this study. They also reiterated creating a unique community and economic development identity, so developing a strong brand of value proposition for businesses and mixed use uses, creating big partnerships, so neighboring communities, aligning community development with the regional partners. Yeah, so events showcasing the area was important. And yeah, so I think there's just like understanding the capacity of developers was a big one. Now, we wanted to talk a little bit about financial tools because I think one of the goals for this project was we don't really have a lot of money to develop this land for readiness. Like how do we put this on most the other properties, you know, property developers side. So there's a number of ways municipalities actually do this. The biggest one is through tax incentive, increment, equivalent programs. So basically when you when the land is just sitting there, there's a property value when you build on it, the property value of course increases. So the increase of the property value generates more taxation income. So there you can give some credits. So a lot of municipalities give property credits for, let's say, the first few years. So if it goes from 100 to 300,000, whatever is the taxation on that, 300,000, maybe they only pay 75% of it for the first few years. This is one way to offset the costs for the developers and incentivize them to come in. So tax incentives was a big one for municipalities. They did development charge. you know, abatement programs to support redevelopment of property. So that's mostly for properties that already exist. Municipal fee program was an important one. So any kind of cost associated with planning, building permits, changing of bylaws, giving some, you know, tax credits or credits there was an important way to attract investors. Creating employment was an important one. So if you're going to build here, please hire local, that kind of campaign. That was an important one and, you know, successfully done enough new communities. And then, of course, cost sharing was an important one. So municipality shares the cost of developing, building something with the developer. Now, it is important to note that in most of the cases, I would say like 95, I would say like almost 100 for us, but there exists cases that is the exception is that they sold the land, right? Like there was never almost a case that we talked to at least anyone where they, where they released the land. And the biggest reason for that is that it's really difficult for them for developers to, you know, find financing if they don't own the land. And that's the biggest reason. So the way municipalities still control the visioning of that land is to what is called a disposition by law, like land disposition by law. So that's like basically, a bylaw that's in place to say, if we're going to sell this land, these are the conditions of the sale. If you don't develop within a few years, we're going to buy it back at Redex. You are only allowed to build this type of development there. This type of development coming from the vision that the community set, you know, and other conditions. So this disposition of the land bylaw is incredibly important because you're most likely going to have to sell that land But having control over what is being built and how it's being built and at what time period it's being built is how you're going to have control over it through a disposition by law. So that was that was kind of like how you know HRM mountain Windsor like all of these places that had these in place went about doing that. Okay, so I'm just realizing that we should have gone through like this targeting the streets before this, but anyways, well, you know, it's, it's what it is. So we'll go on to slide 31. So based on community priorities, you know, financial burn strategic plans, municipalities, strategic plans that were shared with us, provincial priorities, market demand, competitive advantage, economic impact, all of that. taking into consideration we thought these three clusters are what we think could take off today. You know if we thought about even investment attraction today without having to wait for the future for population increase and we don't know like what will happen in the future. And the reason why I put the word clusters there because Whoever we talked to, but especially Halifax was an important one, was that they often talked to us about not being scared about committing to one thing. What they said to us is start the node somewhere, to start one thing, pick a cluster that you think is going to work. there, like whether it's tourism or healthcare or renewable energy, and just start building and other things will happen. So, you know, if it's tourism, like, okay, you know, attract like a hotel, and then you're going to have those local restaurants popping up automatically and the gas stations and whatever else. And all of a sudden you're going to start to see a cluster happening. So, Dartmouth Crossing was an example that they gave us. So, just what's important is picking a cluster, starting with the node, like starting with one investment, and Soon enough, a community of that cluster would pop up. Health care was something that we picked because of the population composition today. That's something that your future population is going to need. More folks that are going to move here are going to be of senior population. They're also going to be looking at whether there's a hospital or a health care clinic to pick shelter as a community. Health care we felt was missing and it's a critical essential need. And also, that's an area where province has funding. So, you know, you wouldn't have to, there's potential leads to cost share with the province, you know. So, that was an important kind of sector that we thought. And there, if you have a health clinic, you can have a, you know, maybe some, there's developers that are investing in senior home care, that's a big investment that's happening across the province. You know, then you'll see like a pharmacy open up so that you'll see like this kind of cluster happening. So what's important is this kind of like picking the cluster and then just letting it form. I think that for in terms of economics, renewable energy, we still think is a really important cluster. If there's a lot of talks about it, you know, you have minerals, critical minerals in the future. And I think when this industry takes out that's a more futuristic one, folks are going to look at retaining employment from here, but where are they going to live? like where the worker is going to live. And that's when we think maybe a mixed use housing would be like a very forward thinking investment. And there when you have mixed use housing, you'd have retail space underneath and all of that. So then you'd have like the commercial part developing as well. And then you'll naturally see communities of restaurants popping up, retail, et cetera. You know, retail really looks at population demand household income and who's going to come and shop there. So that retail experience could be very well a combination when you're thinking about mixed use planning. So these are the kind of three clusters. Happy, we're happy to get more into detail about them. We'll work with Warren and Bal. Like they've been great to guide us so far. So, but, you know, maybe I can stop for a minute here and get your feedback here. Like, what are you thinking if there's something kind of shocking or if it's surprising or not at all, you know, Take take the temperature here. Yeah.

[00:44:20] Penny Smith
Well, for me, I'm wondering how these will relate to the existing businesses that are in the two towns. Yeah, specifically. I'm thinking town is sheltered and town of law for it. But of course, if we were to move forward to barrington areas, well, I think, I think some of our discussions were about augmenting as opposed to competing. Yeah. And I don't know if that's I don't know.

[00:44:45] ASBB Consultant
Yeah. I mean, that's a really good question because we heard about the sale of the town or shall burn land, right? I don't know what's going to happen there. Like, do we know? Okay. So I mean, definitely there might be some competing interest, but I think that, you know, housing is, I don't think that there's too much housing demand for housing for sure.

[00:45:06] Penny Smith
Yeah.

[00:45:07] ASBB Consultant
So that would be a safe one where even if they built something there, you'd still need housing here. Tourism would be one of them. I think that the hotels and gas stations, they're just not enough of them. Healthcare, I don't think that there's too much competition on that. We just don't have one. Even if they build housing there, there's just no place to go for healthcare. I think when you're aging, you're driving time to a nearest hospital like that really matters and that's not accessible here. A lot of folks actually move to Yarmouth from these kind of remote communities that don't have healthcare access because they don't want to, but they have to downsize and move because, you know, they have regular appointments at the hospital and so on. So if that's your critical mass, your population is mostly made up of seniors, that's just like something that is going to be a need that comes up. And thankfully that there's provincial partnerships, the provinces thinking about it other than defense. I believe health is like the second biggest you know, priority for the province. So, yeah, like in terms of finding money, we think that that might be a good place, you know.

[00:46:19] Penny Smith
Thank you. C-A-O and then Councillor Richardson.

[00:46:22] CAO MacLeod
Yeah, I think we need to do some more work on healthcare services. I mean, we are going to hopefully have another big healthcare facility here for seniors. But there's probably a lot of uncillary healthcare services that could Cluster around that that might be located on the 103 property. Like, for instance, one that just comes to the top of my mind is, you know, Alzheimer facilities that specifically cater to Alzheimer's patients, these types of things. I'm sure that there are other opportunities for other healthcare services that would attract people not just from our area, but from Yarmlet and Queens and other places. So that's an area I'd like to look at more closely.

[00:47:10] ASBB Consultant
And I think one of the biggest market gaps there are like specialty services. You know, if you let's say orthodox, you know what I mean?

[00:47:18] Penny Smith
I just want to say the dentist.

[00:47:20] ASBB Consultant
Yes, would be wonderful to have you. Like if you have any kind of foot problems, you have to go to Wolfville now. Like there's specialists there. So, you know, if there's like a missing specialist. Sure. That could be, for example, an area.

[00:47:36] Penny Smith
Councilor Richickson, thank you.

[00:47:39] Dale Richardson
Yeah, and everybody has heard here uncomfortable that my beef is we don't have a destination. I call it hotel. It's had full facilities and so on. The only thing I would say there is again, it means to be to fit that niche market. What is selling in the recreation side is not a hotel for a night stay. I'm talking about something that has a view and on the ocean. I just want to stress that point because we have spaces around, but there certainly isn't enough in the recreation side to the point you have. When we have competitions locally or in the schools or whatever, they have no place to stay and they go on the Liverpool at closest and also eating. The only, uh, the renewable energy, uh, I think the field is wide open and every jurisdiction on the face of the earth is moving for renewable energy. We are not going to continually fight over air quality and oil for the end of time. So that to be that field is going to be open. And again, to your point, I think the housing, uh, is something that is critical. We don't, I don't think we can over have an over abundance of housing. The more availability is, it's just competition and it will drive the prices. When you don't have competition and housing, you can charge pretty well what you want and people are doubling up and tripling up and you spend more money than what you probably should to just have a place. That's just some of my thoughts and I think you were right on and most of these.

[00:49:41] Penny Smith
Thank you for that. We've said this before, but when people come to the community, three of the main questions that are asked are, can I get internet service? Can I get a doctor? And what are the recreational services for my family? Those questions come up time and time again. And I remember there was a gentleman at one of the sessions that you had hosted when we talked about the property. And he said, you know, one of our most valuable assets in this community is our harbor. Yeah. So whatever we're doing with these properties, we should be, that has to be one of the focuses.

[00:50:25] Thoburn-Irvine
Yeah. Thank you. So I guess it's combines what these two comes with just that because again, you know, when I say low-hanging fruit, I'm talking about achievability. And so you've mentioned this as well. Not so much that I forget the name of the boss center just outside of pace code. I don't know if it's stonehurst. I saw the name on one of the threads, but it's stone something and it is fabulous. So in the health and wellness hotel, you know, convention center, because we don't have those services, you know, on our other property, the heart's point. But if we can zone in, I mean, this makes us a destination. So the dialysis unit that's being built and planned and built for the Roseway hospital, You know, we've got an aging population. If we could get ourselves a gerontologist and imagine if you could have a shared clinic space with a gerontologist and an ortho, not a don't test what the orthopedic, whatever those some specialties are, you know, like you have an aging population.

[00:51:38] ASBB Consultant
Yeah.

[00:51:39] Thoburn-Irvine
Yeah. I mean, And so the wellness, the spa, like, you know, and maybe that's over on the heart's point, like I said, but yeah, you think that should be achievable. If we could garner one of those rare species, a gerontologist is what I'm talking about. I don't know that they're that easy to come by, but my goodness, if we could get one, we'd have people from area communities traveling to us. We could be the center instead of heading off to another regional center.

[00:52:12] ASBB Consultant
And then there's models of that, you know, and in Cape Breton area, they opened another health clinic, like a new one, right? So health, we felt was something that was missing that came out in community consultations. The economics is there, like the money is there for the province right now. Renewable energy is also, like, it's happening, but, you know, it's going to take time. So if you want something more current, like a thing to health care, and that goes along with the wellness theme. And you'll see like similar kinds of shops popping up. There is a committee center. I believe in guide. I want to say guys burrow Sydney guys burrow area like they have like a new wellness kind of spa. Open up in the same thing like health center, committee health center, and all of those assets opening up an anti-genish area. So we are seeing that in the north of province, you know, yes.

[00:53:06] Penny Smith
Thank you for that. Councilor Schand and then Councillor or sorry, Deputy Warden.

[00:53:11] Angie Shand
Those areas are able to get the health care because of the trade area that they have because they have the other options of the hotels, the stores, the swimming and all that. One of our biggest issues with health care providers, we cannot keep them because we don't have those services. So they're leaving because our education system is not as good as it is in Halifax. They have to travel so far to get to the airport and so It's really hard to bring in the healthcare piece without having those other pieces because they won't stay here because we don't have those other services. So it makes it very hard to attract healthcare. We struggle with the clinic that we have to house them for that very reason. So we need those other services to get the buying in for the specialists and the geriatricians are like, they'd almost all exist. So it's very hard to get those folks to come here without having those other pieces. I do think how you're saying like a wellness retreat place. would probably be something that would be very what, like the heart's point property, like something like that. That's like a white point you could bring to heart's point, which would be amazing. Well, Barbara, something and something like that would be a draw to healthcare professions and things, but it's the healthcare piece of the very hard buy-in without having those other services. Other than, like, if we can get, you know, the seniors building, that's gonna hopefully go through, that's different, but to bring in specialties, very hard to attract without having the other pieces to go along with that.

[00:54:40] Penny Smith
When I said Fox Harbor, I was thinking the accommodations and beauty of it all and the whole wellness.

[00:54:46] Angie Shand
I was kind of hoping that this study was going to tell us exactly what we needed to do. This is what you need to hold on and this is what your community needs to bring instead of more vague. We're aware that our trade area is what it is and that's why we can't get the box stores and those things. So I was really hoping this was going to say this is your target. This is what we spent the money to do the study. This is where you need to go and what it's going to tell us we should do for future.

[00:55:14] ASBB Consultant
Yeah, thank you for that. I think that that's exactly the goal of the study. You know, we were kind of in the draft phase of the implementation plan. And part of this was coming up with kind of three areas where We wanted to get the temperature here in this room, like are we on the right track? But I think the next step is kind of take this temperature and hone in on our recommendation of what we think could go here. Of course, it's going to only be a recommendation. It's up to the community, part of that is doing the visioning, right? Like we saw in other places, but the community can accept things like that. But that's kind of definitely the next step of the report, for sure.

[00:55:52] Penny Smith
Thank you for that NCAO. Did you wish to comment on that?

[00:55:56] CAO MacLeod
I just wanted to echo Councillor Shan's comments there. When you finally come back to us with the report, I think it's really important that there's more of a bullseye given to us in terms of specifically what we can put there. It is going to be a bit challenging because you are going to have to think in your mind what's potentially going to happen at Hart's point because There is going to be an impact between the 103 property and the heart's point and the two property shouldn't be competing against one each other. It's a complement one another. The one thing that I also think that this report needs to focus in a bit more on is, you know, you talked about the. the populations of Shelburne, Yarmuth, and Queens, and that whole point of the 103 property was that it's actually aggregating all of those populations because it's in a strategic location that is attracting people from one hour away in Yarmuth and Queens. So the idea here is that that that property is located in a place where the aggregate population is in 14,000 in Shelburne. It's actually, you know, 50, you know, whatever the aggregate is of those three counties, that's the idea. So, what gaps are there in Queens, Shelburne and Yarmouth that we could put at the 103 property that's going to attract a business that is looking for an aggregate population of three counties combined. So, it's not just what is the gap here in Shelburne. It's what's the gap in Yarmouth, what's the gap in Queens that we can serve us here.

[00:57:44] Heidi Wagner
Okay, thank you for that, Jeffie Ewarden. And the only other thing that I want, and I agree with everything that's been said, but with the healthcare, we can't close a belonging die to the mental health and addiction problems that's happening in this community. It's growing drastically all the time. And these people cannot get help. They're being sent to New Brunswick. They're being sent wherever they need something that's closer. They need to be, have an option and get the help that they need.

[00:58:14] Penny Smith
Yeah, and it needs to be more immediate than a month old or a couple of months old. And then Councillor Sutherland and then Councillor Richardson.

[00:58:23] Paula Sutherland
Being in health care, we're pretty tied to what we can do in health care as a municipality. That's a provincial jurisdiction, and we can cry and complain all we want. But it's a province that has the final say here on that. And I agree with everything Angie and I see AOS as well.

[00:58:44] Penny Smith
Thank you, Councillor Richardson.

[00:58:46] Dale Richardson
It's just maybe a couple of points and I think you have them in there. And when I mentioned the hotel and the housing, when we talk about complimentary to the properties, now my vision or my take would be the hotels and the housing, the excellent place for that would be in heart's point. I'm thinking of that property just for the availability of elevation, abuse or, and I would have thought we would concentrate more on the industrial side or retail side on that 103 property. But that being said, the other part I want to champion is tax deferrals and partnering for development is to be a competitive at all. If I'm a developing company or want to go in somewhere, they're paying zorinant rates going into Halifax just for the fact of being there. But if I can build the same facility in children that has sewer and water available and a deferred tax rate for maybe, I don't know, five, 10 years. And to me, I'd like to see that roadmap. what would be a good enticement for them? Is it five years? Is it 10 years? And to me, setting here, I would rather collect nothing for taxes for the five years if they're here and anchored.

[01:00:30] Speaker B
So just those thoughts.

[01:00:35] Penny Smith
Yeah, we're all trying to encourage entice the same people, like businesses, to the community or very similar to like-minded communities, I think. So, I think your spot on Councillor Richardson, there has to be some type of incentive there. Any other questions or comments at this point? Okay. Giving you lots to think about, Manny.

[01:01:02] Speaker B
Yeah, absolutely.

[01:01:04] ASBB Consultant
Well, I want you to know that you folks can resonate with the industries at this, and I think then we can kind of, you know, narrowed down from here. The last thing that I had was just kind of like showing you through like a roadmap, like when you are looking at implementation, what does that look like? So that I think we can go on to the slide 36 here. Yeah, so usually it's done in the phase approach, almost everyone that we talked to and all the reports that we consulted, like everyone did it in phases. Nobody attempted to finish it from step one to zero. in less than 10 years kind of time. So phase one was always, you know, visioning, planning, understanding, you know, what are the constraints, what is going to be the permitting, et cetera. Second phase was always kind of identifying the infrastructure, the funding, the partnerships, who, who, you know, what, what is the site readiness look like, who's going to potentially come here, identifying the investors, et cetera. Phase three was investment, like heaviness. So after you talk about, you know, phase two, where you're Reading the site, securing the funding and all of that. Only then can you kind of go and attract investment because investors are going to want to know what is a site ready. Does it have sewer water? What kind of tax incentives are there? Like all of these things need to be in place in a packaged way. And then investor attraction happens. And a lot of the investor attraction, what we learned was like focusing in on local developers, you know, building these relationships that are existing locally. going to trade shows, you know, just inviting them here, like having a roster of locals first. So that's kind of phase three. And then phase four is just growth and phase development. So when one node happens, so like if it's, if it's, let's say, healthcare, you have just a healthcare facility, then kind of, okay, what is, what, what matches this development? So then even think about wellness or you can think about a senior's home. or you can think about some kind of accommodation type that's wellness related, right? Like, so just kind of really being clear on the vision, which is identifying the cluster and then letting the phase development happen at phase four based on that natural cluster forming. So that's kind of like what at a very high level, what the implementation roadmap looks like. And then the next slide, which is our gonna be hopefully like the last slide for today, is kind of showing you you know, what that entails, right? So vision planning strategy council is involved, of course, planning, you know, economic developments involved there. Site readiness engineering, that's when you have to kind of like talk about talked engineering, prevent province municipality. When you're thinking about infrastructure and servicing, so like the actual master plan, funding waste water, so that's all municipality utilities housing. investment attraction is also economic development, municipality, like that's, you know, working with the province heavily. And then lastly, you know, you can kind of look at like, okay, what is the strategy and the monitoring and all of that, that, you know, council can come, come together. But really the developers are really at the development and growth phase. So employing the employment, land development, commercial gateway development, That's where the developers come in. You know, there's a lot of work that's to be done by municipalities and councils before that by getting the infrastructure ready between phase one and phase three basically. So it is like this is a 10 year process and this is, you know, when we look at other studies or when we talk to other folks, it's always been a 10 year. Just just the infrastructure readiness, like putting sewer and water coming up with the funding for that. You're looking at a five year. you know, window. So it's just to, you know, this is just to give you some realistic expectations, you know, yes. Yeah.

[01:05:06] Penny Smith
I'm still hoping it wouldn't take that long. We want to see things developed in our economy grow and people coming into the area. Yeah. Our youth are scary. Young people are staying. There's lots of jobs for everyone.

[01:05:21] ASBB Consultant
Yeah. But I think the news is that you know, the town property sold right like that. That's an example of like just it can like develop and just can spur, you know, if the right minds are there and if the right eyes are on it. So like talking about the investment plans, like clearly visually and having that like publicly available right away. And then going to those trade shows and communicating like the like communities willingness to attract properties. Like I think you'd be surprised at how fast these sales happen. And then, you have a disposition strategy you have to build within two years. So that disposition line strategy is going to be very, very important to have control over that.

[01:06:05] Penny Smith
So thank you very much for the presentation. I know we've probably kept you a bit longer. Thank you for thinking, but I really appreciate that. We appreciate the slides and the conversation. I think staff and council gave some, made some good comments about what we'd like to see for the final report, which I'm not sure if you have, can provide a timeline for that, but that would be the next step, would be to have the final report presented to council in August. Oh, okay. And then, of course, staff will analyze it. And Council will have a discussion at that time on it at that time. Yeah. Okay. Any other questions or comments for Manny? Okay. Wonderful. Thank you again. It's exciting to have this report and looking forward to the final report and for us to get moving on it.

[01:07:10] ASBB Consultant
Yeah. Yeah. Absolutely. Well, there are best to kind of just make you ready for For what we say is phase three, that could happen faster than phase one and two, so for sure.

[01:07:19] Penny Smith
Okay. And an appreciation as well goes out to the community that participated with the different sessions that were held in the interviews that you held as well. Those are all an important part of this process. So.

[01:07:34] ASBB Consultant
Absolutely. And you know, we've developed like a good few relationships. So like a good few contact list. So I think the municipality can definitely reach out to these folks that we talked to as future references. So we've been asking each and every one that we did, you know, that we talked to can, you know, is it okay that at some point the municipality which is out and everyone was open. So I think that's going to help as well.

[01:07:56] Penny Smith
Yeah. Okay. Wonderful. Thank you again. Thank you. Are you driving back to Germany? Yeah. Yeah. Yeah. Thank you so much. Thank you so much.

[01:08:04] ASBB Consultant
We are going to move on to economic and community development. And we're going to talk now with the Jill Web, our economic development officer and coastal planning. Welcome.